

FY 2022 Maryland Arts and Entertainment District Economic and Tax Impact Analysis

Prepared for
The Maryland State Arts Council

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October 18, 2023



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1.0 Executive Summary

The Maryland State Arts Council (MSAC) is a State agency whose mission is “to advance the arts in our state by providing leadership that champions creative expression, diverse programming, equitable access, lifelong learning, and the arts as a celebrated contributor to the quality of life for all the people of Maryland.”¹ MSAC operates under the authority of the Maryland Department of Commerce, underscoring the State’s endorsement that the arts are an integral component of both creative and economic ecosystems within Maryland.²

MSAC manages a variety of programs statewide that supports the arts at the individual, organization, and community levels.³ One of these programs is the Arts & Entertainment Districts (A&E Districts) program, designed to “develop, promote, and support diverse artistic and cultural centers in communities across Maryland that preserve a sense of place, provide unique local experiences, attract tourism, and spur economic revitalization and neighborhood pride.”⁴

Each year, MSAC distributes an annual report for each district to complete. The report highlights the activities undertaken within these districts for the past fiscal year (FY 2022). MSAC then provides these annual reports to Towson University’s Regional Economic Studies Institute (RESI), who tabulates the annual report data into a survey report. This report details a variety of activities that have occurred within the state’s A&E Districts. RESI then utilizes some of this data to conduct an economic and tax revenue impact and footprint analysis that examines business growth within district borders, as well as visitor impacts from events and festivals. This year’s analysis covers the findings from the FY 2022 district reports. Since there was no net business growth or attendee data provided by the Annapolis or Gateway districts, this report only covers the impacts of 27 of the 29 A&E districts.

FY 2022 refers to the period beginning July 2021 and ending June 2022. In March 2020, the COVID-19 virus began spreading in the U.S., leading to periods of mandatory business closures, stay-at-home orders, and social distancing mandates. By mid-2021, many of these mandates were slowly being lifted, but COVID-19 cases rose again due to the Omicron variant over the early winter of 2021. Fortunately, by March 2022, COVID-19 cases had declined, and the pandemic recovery continued. The FY 2022 district reports reflect the continuing recovery from the pandemic. Compared to FY 2021, FY 2022 had a significantly higher number of events, festivals, and attendance. However, the economic recovery has been challenging. Inflation is rising more than ever due to multiple factors including the pandemic, war in Ukraine, and labor shortages. For these reasons, this report's economic impact analysis results do not represent an average fiscal year.

¹ “Strategic Plan,” Maryland State Arts Council, accessed September 6, 2023, <https://msac.org/about/strategic-plan>.

² “About—Authority,” Maryland State Arts Council, accessed September 6, 2023, <https://msac.org/about>.

³ “Programs,” Maryland State Arts Council, accessed September 6, 2023, <https://msac.org/programs>.

⁴ “Arts & Entertainment Districts—Program Goals and Strategies,” Maryland State Arts Council, accessed September 6, 2023, <https://msac.org/programs/arts-entertainment-districts>.

1.1 Economic Footprint

In addition to business operations and spending associated with attendees of events and festivals, Maryland’s A&E Districts support additional economic activity throughout the state. For instance, event organizers buy supplies from other Maryland firms, or retailers pay their workers who then pay rent and buy groceries. The sum of these direct and secondary expenditures is the total economic footprint.

In FY 2022, the 27 reporting A&E Districts had a total economic footprint of:

- Approximately 1,185 jobs, comprised of 504 jobs supported by attendee spending and 681 supported by net business growth;
- Approximately \$149.5 million in state GDP, with nearly \$52.0 million from attendee spending, and more than \$97.5 million supported by net business growth; and
- Nearly \$45.7 million in employee compensation, comprised of \$16.9 million from attendee spending and approximately \$28.8 million from net business growth.

Figure 1 below contains the footprint of Maryland’s A&E Districts by type of activity. Please note that sums may not total exactly due to rounding.

Figure 1: Economic Footprint of Maryland's A&E Districts, FY 2022

Activity Type	Direct	Indirect	Induced	Total
<i>Overall Attendee Footprint</i>				
Employment	396	51	54	504
State GDP	\$29,545,843	\$11,703,821	\$10,670,140	\$51,919,808
Employee Compensation	\$10,277,729	\$3,444,767	\$3,154,122	\$16,876,623
<i>Net Business Growth</i>				
Employment	460	118	102	681
State GDP	\$54,311,044	\$24,435,617	\$18,796,558	\$97,543,219
Employee Compensation	\$16,336,821	\$6,880,844	\$5,556,948	\$28,774,614
Total				
Employment	855	169	156	1,185
State GDP	\$83,856,887	\$36,139,438	\$29,466,699	\$149,463,028
Employee Compensation	\$26,614,550	\$10,325,611	\$8,711,070	\$45,651,236

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

1.2 Tax Footprint

The economic footprints presented above produced nearly \$8.1 million in tax revenues for state and county governments. As seen in Figure 2, sales and property taxes formed the majority of these revenues.

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Figure 2: Total State and County Tax Footprints of Maryland's A&E Districts, FY 2022

Activity Type	Property	Income	Sales	Payroll	Other	Total
Out-of-State Visitor Impact	\$219,970	\$156,543	\$258,708	\$3,386	\$71,433	\$710,038
In-State Attendee Footprint	\$649,219	\$443,789	\$763,549	\$9,651	\$212,768	\$2,078,977
Business Net Growth Impact	\$1,675,320	\$1,062,922	\$1,970,352	\$22,243	\$557,133	\$5,287,972
Total	\$2,544,509	\$1,663,254	\$2,992,609	\$35,280	\$841,335	\$8,076,987

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

Maryland's A&E Districts contribute to the cultural fabric of the state as well as the economy. This economic activity is shared throughout the state, ranging from dense, urban districts in Baltimore City and the suburbs of Washington, D.C., to sprawling districts that cover entire downtown areas on the Eastern Shore. As the A&E District program continues to grow, and local residents continue to establish districts in their communities, the arts and creative energy in the state will continue to flourish—and benefit the economy.

2.0 Introduction

The Maryland State Arts Council (MSAC) is a State agency whose mission is “to advance the arts in our state by providing leadership that champions creative expression, diverse programming, equitable access, lifelong learning, and the arts as a celebrated contributor to the quality of life for all the people of Maryland.”⁵ To achieve this mission, MSAC works to increase participation in the arts for all Maryland residents, provide support to all MSAC constituents, further build its organizational and governance capacity, leverage current partnerships and create new beneficial collaborations, and lastly, showcase Maryland’s diverse and vibrant arts community and the contributions they make to the state.⁶ MSAC operates under the authority of the Maryland Department of Commerce, underscoring the State’s endorsement that the arts are an integral component of both creative and economic ecosystems within Maryland.⁷

MSAC manages a variety of programs statewide that support the arts at the individual, organization, and community levels.⁸ One of these programs is the Arts & Entertainment Districts (A&E Districts) program, designed to “develop, promote, and support diverse artistic and cultural centers in communities across Maryland that preserve a sense of place, provide unique local experiences, attract tourism, and spur economic revitalization and neighborhood pride.”⁹ Each A&E District has unique economic development goals and priorities, which can include producing or facilitating events, attracting new businesses or developers, encouraging artists to locate and/or sell artworks in the district’s boundaries, or a combination of strategies.

Each year, MSAC distributes an annual report for each district to complete. The report highlights the activities undertaken within these districts for the past fiscal year (FY). MSAC tasked Towson University’s Regional Economic Studies Institute (RESI) with analyzing the data collected from the annual report. To achieve the project objective, RESI collated and analyzed the survey results in a comprehensive report of 27 reporting districts for FY 2022.¹⁰

Once this preliminary analysis was completed, RESI utilized the results to conduct an economic and fiscal impact analysis of the state’s A&E Districts. To quantify the role of A&E Districts within Maryland’s economy, RESI considered the role of net new business growth within district borders in as well as spending associated with attendees at events and festivals within district boundaries in FY 2022. This analysis continues the 13-year relationship between MSAC and RESI, and updates the economic and fiscal impact analysis to reflect changes in the underlying model data.

⁵ “Strategic Plan,” Maryland State Arts Council.

⁶ Ibid.

⁷ “About—Authority,” Maryland State Arts Council.

⁸ “Programs,” Maryland State Arts Council.

⁹ “Arts & Entertainment Districts—Program Goals and Strategies,” Maryland State Arts Council.

¹⁰ The Annapolis and Gateway districts did not provide data for FY 2022 and are not included in the analysis.

The report continues as follows:

- Section 3.0 presents the methodology utilized for the analysis;
- Section 4.0 provides background information about the role of cultural and arts districts in the economy;
- Section 5.0 presents the economic analysis;
- Section 6.0 presents the tax revenue analysis; and
- Section 7.0 concludes the report.

In addition, the report contains several appendices that present more detailed methodology, detailed results, information on A&E Districts, and the annual report template.

3.0 Methodology

Maryland's A&E Districts support creativity, and in turn, spur economic activity in their localities. This activity supports additional businesses throughout Maryland's economy. Thus, the total influence of Maryland's A&E Districts extends beyond district borders. This total activity can be quantified using economic impact models. This section will provide more context on the economic model used in the analysis as well as RESI's modeling process.

3.1 Model Background

For this analysis, the economic models are based on multipliers for Maryland's economy. Based on the activity under consideration, the model can estimate the economic activity associated with suppliers/inputs as well as any additional activity that occurs because employees who carry out the activity or suppliers use their earnings to support their households. In economic terms, the *direct effect* is the activity under consideration, the *indirect effects* are associated with suppliers, and the *induced effects* are associated with increased household spending. In addition, all of these effects generate tax revenues for state and county jurisdictions.

Consider the following hypothetical example for a gallery in an A&E District: the direct effect is any activity associated with the gallery itself (art sales, admission sales, etc.). The indirect effect would be spending on supplies to run the gallery (canvas, paint brushes, electricity to light the gallery, etc.). The induced effect would be spending by the employees of the gallery or any of the suppliers (buying groceries, going to a movie, paying rent, etc.).

Direct, indirect, and induced effects can be presented in a variety of ways—in terms of employee counts, state GDP, or employee compensation. Since these metrics represent different ways of measuring the same effect, they are not additive. For the FY 2022 economic and tax analysis of Maryland's A&E Districts, RESI used the IMPLAN model for the state of Maryland for 2021 (the most-recent model) and represented the results in 2022 dollars. The 2021 model year is based on a 546-sector scheme for the state's economy.¹¹

¹¹ Angela Slovachek, "U.S. 546 Industries, Conversions, & Bridges," IMPLAN, updated May 2023, accessed September 7, 2023, <https://support.implan.com/hc/en-us/articles/15398463942683-U-S-546-Industries-Conversions-Bridges>.

As noted in the last two reports, this scheme was not used in any of the analyses conducted prior to FY 2019. Due to this variation, as well as significant changes to the underlying data in the model, the results of the IMPLAN analysis in this report cannot be directly compared to reports prior to FY 2019.¹² Beyond the sector scheme transition, IMPLAN introduced an updated tax results section that no longer includes the “state and local tax impact” category used in all RESI reports before FY 2019.¹³ As with the previous three reports (FY 2019, FY 2020 and FY 2021), RESI combined the state and county tax impact results to best replicate the former analysis category. For this reason, tax impact analysis results in this report cannot be directly compared to any report prior to FY 2019. Additionally, IMPLAN notes that some economic effects may appear smaller in this up-to-date version of the model due to methodological and underlying data changes, even if the economy is not shrinking.¹⁴

3.2 Modeling Approach

To capture the economic activity associated with Maryland’s A&E districts, RESI considered two different activities: spending associated with attendees at events in festivals within A&E Districts during FY 2022, and activity associated with net new businesses that opened within A&E Districts in FY 2022. Please note that some of these processes have been updated from prior analyses to re-benchmark spending patterns. Thus, these results cannot be directly compared with prior reports.

3.2.1 Modeling Attendee Spending

Events and festivals within Maryland’s A&E Districts attract thousands of attendees from within Maryland as well as out-of-state visitors. It is important to consider the residence of attendees because any spending by visitors brings new dollars into Maryland’s economy, whereas Maryland residents are reallocating spending towards the A&E District’s local community. Economic effects associated with spending by visitors to the state are *economic impacts*, while the effects associated with all attendees (regardless of their state of residence) can be considered the *economic footprint* of the event or festival.

To calculate the traditional economic impacts and the economic footprint of events and festivals in Maryland’s A&E Districts in FY 2022, RESI utilized information provided in the annual reports. Generally, A&E Districts provided a list of events and festivals as well as approximate attendance. Please note that this may result in under-counting or over-counting of attendee counts in some districts. RESI used these attendance figures and research published by Americans for the Arts to estimate attendee spending at A&E District events and festivals. These calculations take into consideration both the proportion of attendees that are Maryland

¹² Candi Clouse, “BEA Benchmark and the New 546 Industry Scheme —Comparing Data Across Time,” IMPLAN, updated August 2023, accessed September 7, 2023, <https://implanhelp.zendesk.com/hc/en-us/articles/360034895094-BEA-Benchmark-The-New-546-Industry-Scheme>.

¹³ Candi Clouse, “Version 6 Release Notes,” IMPLAN, updated October 2022, accessed September 7, 2023, <https://support.implan.com/hc/en-us/articles/1260802300950-Version-6-Release-Notes>.

¹⁴ Clouse, “BEA Benchmark and the New 546 Industry Scheme —Comparing Data Across Time.”

residents versus out-of-state visitors, as well as the different spending patterns for these two groups.¹⁵

RESI then matched these spending categories with industry sectors in the IMPLAN model and entered these spending totals into IMPLAN, which calculated the direct, indirect, and induced effects of attendee spending for events and festivals in Maryland’s A&E Districts. Results were reported for the economic footprint as well as the economic impact. State and county tax revenues associated with the economic analysis were also calculated within the IMPLAN model.

3.2.2 Modeling Net New Business Activity

RESI also quantified the economic impact associated with net new business activity (the total number of businesses that opened during the FY less the total number that closed). For this analysis, RESI utilized data provided in the annual reports—districts provided lists of retailers, businesses, restaurants, and organizations that opened or closed within the district’s borders. Generally, employee counts were also provided. In cases where employee counts were unavailable, RESI estimated employment levels based on other A&E Districts’ data. Please note that this may result in under-counting or over-counting of employment levels in some districts.

RESI then matched these businesses’ employee counts with industry sectors aligned with the business. These employee counts were then entered into the IMPLAN model, which calculated the direct, indirect, and induced impacts associated with the net new businesses in Maryland’s A&E Districts. Associated tax revenues paid to state and county jurisdictions were also estimated within the IMPLAN model.

4.0 The Arts and their Role in the Economy

According to the most current edition of Americans for the Arts report, *Arts & Economic Prosperity V*, the nonprofit arts and culture industry in the U.S. generated \$166.3 billion in total direct expenditures and \$96.1 billion in resident household incomes in 2015. This activity supported 4.6 million full-time equivalent jobs. Jobs within the arts and culture industry account for 0.8 percent of the U.S. workforce, which exceeds the proportion of the workforce who are Police Officers (0.5 percent) and Computer Programmers (0.2 percent).¹⁶ Taxes associated with the industry and paid to local, state, and federal governments amounted to \$27.5 billion.¹⁷

¹⁵ Americans for the Arts, “The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences in the State of Maryland,” 1, accessed September 6, 2023, https://www.americansforthearts.org/sites/default/files/pdf/2017/by_program/reports_and_data/aep5/map/MD_StateOfMaryland_AEP5_OnePageSummary.pdf.

¹⁶ Americans for the Arts, “Arts & Economic Prosperity V: The Economic Impact of Nonprofit Arts & Cultural Organizations and Their Audiences,” 5, accessed September 6, 2023, https://www.americansforthearts.org/sites/default/files/aep5/PDF_Files/NationalFindings_StatisticalReport.pdf.

¹⁷ Ibid, 4.

The arts and culture industry is also important to the Mid-Atlantic region. Figure 3 provides key economic statistics at the state level. These metrics provide useful context to Maryland’s comparative standing, as well as the role of the industry in the region. As shown in Figure 3, the District of Columbia tops the charts in value added per capita. This is likely due in part to its population being smaller than the other four comparison areas, in addition to other local factors.

Figure 3: Statewide Economic Metrics for the Nonprofit Arts and Culture Industry, 2021

State	Value Added per Capita	Compensation per Employee
District of Columbia	\$20,590	\$165,693
New Jersey	\$2,589	\$101,772
Pennsylvania	\$2,198	\$85,348
<i>Maryland</i>	<i>\$1,997</i>	<i>\$98,585</i>
Delaware	\$968	\$69,240

Sources: National Assembly of State Arts Agencies, RESI, U.S. Census Bureau

The Bureau of Economic Analysis (BEA), an agency of the U.S. Department of Commerce, collects and publishes arts-related economic data. The BEA is in charge of the Arts and Cultural Production Satellite Account (ACPSA) to collect and interpret economic data specifically on the arts and culture industry in the U.S.

As of 2021, the most-recent data available from the ACPSA, the industry’s economic activity accounted for 4.4 percent of U.S. GDP, or approximately \$1.0 trillion. In the same report, employment data shows that the industry provided 4.9 million jobs nationwide, increasing arts and cultural employment by 5 percent from the previous year.¹⁸ Employment increased in 49 states with the highest increase in Maine (12 percent), with an exception in Oklahoma where employment decreased by 0.7 percent. The ACPSA also produces state-level data; information on the Mid-Atlantic Region is presented in Figure 4 below.

¹⁸ “Arts and Cultural Production Satellite Account, U.S. and States, 2021,” U.S. Bureau of Economic Analysis, last modified March 15, 2023, accessed September 6, 2023, <https://www.bea.gov/news/2023/arts-and-cultural-production-satellite-account-us-and-states-2021>.

Figure 4: Statewide Economic Comparison of Arts and Cultural Production Industries Across Mid-Atlantic States, 2021

State	Employment	Employment Location Quotient	Compensation (In Thousands)	Compensation Location Quotient
Pennsylvania	165,186	0.86	14,098,351	0.75
New Jersey	126,767	0.97	12,901,314	0.85
<i>Maryland</i>	<i>72,403</i>	<i>0.82</i>	<i>7,137,824</i>	<i>0.71</i>
District of Columbia	54,961	2.28	9,106,673	2.12
Delaware	7,746	0.52	536,331	0.36
United States	4,851,047	1.00	504,213,527	1.00

Sources: National Assembly of State Arts Agencies, U.S. BEA ACPSA

The table above provides an overview of employment and compensation statistics for five states in the Mid-Atlantic region. The ACPSA defines location quotients (LQs) as a measurement of “an industry’s regional concentration of value added, employment, or compensation relative to the U.S. industry’s share.”¹⁹ LQs are based on a number system where a score of one is equal to the industry’s national proportion. For example, in Figure 4 above, Maryland has an employment LQ of 0.82 and a compensation LQ of 0.71. This indicates that Maryland’s employment in the industry is 18 percent below the industry’s national employment share and that Maryland’s compensation in the industry is 29 percent below the industry’s national compensation share. The LQs of Maryland Arts and Cultural Production industries rank fourth amongst the five regions listed above in Figure 4.

Individuals who attend events related to arts and cultural production also contribute to the economy. Figure 5 below shows average event-related spending per person by residential status provided by Americans for the Arts.^{20,21} Resident attendees are defined as members of the audience who live in the area, while nonresident attendees are members of the audience who travel to the locality to attend the event or visit the establishment.

¹⁹ U.S. Bureau of Economic Analysis, “Definitions,” accessed September 6, 2023, <https://apps.bea.gov/regional/pdf/acpsa/definitions.pdf>.

²⁰ Americans for the Arts, “Arts & Economic Prosperity V,” 1.

²¹ RESI adjusted these spending estimates for inflation from 2015 to 2021 dollars. Spending estimates were input as 2021 dollars, with economic impacts inflated to 2022 dollars in IMPLAN.

Figure 5: Nonprofit Arts and Cultural Event Attendees Average Spending per Person (2021 Dollars)

Expenditure Category	Resident Attendee	Nonresident Attendee
Meals and Refreshments	\$17.06	\$25.44
Souvenirs and Gifts	\$3.28	\$5.53
Ground Transportation	\$2.88	\$5.41
Overnight Lodging (one night)	\$0.59	\$8.96
Other/Miscellaneous	\$2.96	\$3.18
Total	\$26.76	\$48.52

Sources: Americans for the Arts, RESI

Figure 5 above shows that nonresident attendees, on average, spend approximately 81.3 percent more than resident attendees spend. The main cost difference is driven by the overnight lodging category, where nonresident attendees spend approximately 14 times more than their resident counterparts. This variation in spending patterns is not the only difference between the two groups: nonresident attendees are referred to as “economic visitors” and the dollars they spend are “new dollars” entering the economy in question. On the other hand, resident attendees would be expected to spend locally even if they did not attend that specific event.

5.0 Economic Footprint and Impacts

This section contains the results of the economic analysis for Maryland’s A&E Districts. Calculations are based on the 2022 IMPLAN Model for the state of Maryland. Economic activity is considered in terms of employment, state GDP, and employee compensation based on attendee spending at district events and festivals held in FY 2022 and net new businesses that opened in the districts in FY 2022. Impacts are presented in 2022 dollars. For more detailed results, please see Appendix C—Detailed Economic and Tax Impacts and Footprints. Throughout this section, please note that totals may not sum exactly due to rounding.

5.1 Overall Economic Footprint of Maryland’s A&E Districts

This section provides a summary of the overall economic footprint of Maryland’s A&E Districts for FY 2022, including the:

1. Economic impact of visitor spending associated with district events and festivals;
2. Economic footprint of Maryland resident spending at events and festivals, which is directed to the localities where A&E Districts are located; and
3. Economic impact of net business growth in the districts.

Despite not being able to directly compare this analysis to all past reports due to changes in the underlying data in the IMPLAN economic model, data provided by districts can show relative changes in activity. For example, the current analysis indicates that attendance for events and festivals is rebounding to pre-pandemic levels. In FY 2021, event and festival attendance was

approximately 0.4 million, and rose to 1.2 million in FY 2022. Net business impacts also saw a significant departure from FY 2021, but are in line with other previous analyses. In FY 2021, the overall impact of the A&E districts varied substantially from previous reports due to the large net business growth impacts driven by the Bethesda district.

Figure 6 below displays the total economic footprint of economic activity of Maryland's A&E Districts in FY 2022.²² In general, older, more established districts tend to have larger economic impacts.

²² Districts with negative impacts do not negatively affect the Maryland economy. Rather, they are the result of more businesses leaving the district than opening in a district within the study period, or if less resource-intensive employment replaces more resource-intensive employment. For example, if one physician job with a salary of \$150,000 is lost but two server jobs with wages of \$40,000 each are gained, there would still be a "loss" of \$70,000 even though the number of jobs increases by one.

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Figure 6: Total Economic Footprint of Maryland's A&E Districts, FY 2022

District	Designation Year	Employment	State GDP	Employee Compensation
Annapolis	N/R	N/R	N/R	N/R
Bel Air	2010	115	\$12,632,611	\$4,085,023
Berlin	2005	38	\$5,555,873	\$1,463,388
Bethesda	2002	58	\$7,691,909	\$2,316,556
Bromo	2013	36	\$4,158,091	\$1,380,825
Cambridge	2003	7	\$677,807	\$222,135
Catonsville	2020	43	\$4,255,973	\$1,461,684
Chestertown	2015	44	\$5,520,530	\$1,686,411
Crisfield	2018	4	\$740,515	\$139,598
Cumberland	2002	34	\$4,355,389	\$1,477,550
Denton	2005	3	\$356,233	\$115,794
Easton	2019	6	\$619,819	\$140,386
Elkton	2006	14	\$1,845,652	\$551,046
Frederick	2003	234	\$28,141,849	\$8,955,426
Frostburg	2009	24	\$2,584,324	\$913,799
Gateway	2002	0	\$0	\$0
Grantsville	2015	4	\$386,458	\$125,619
Hagerstown	2002	74	\$8,805,072	\$3,070,626
Havre de Grace	2008	23	\$2,769,439	\$761,871
Highlandtown	2003	36	\$5,210,804	\$1,202,461
Leonardtwn	2014	24	\$2,164,168	\$461,473
Oakland	2017	10	\$1,180,779	\$330,417
Pennsylvania Ave.	2019	0	\$0	\$0
Salisbury	2007	125	\$20,904,411	\$5,418,453
Silver Spring	2002	63	\$8,127,432	\$2,397,853
Snow Hill	2006	9	\$281,087	\$74,553
Station North	2002	39	\$4,864,170	\$1,500,783
Stevensville	2014	27	\$3,667,229	\$1,310,282
Wheaton	2006	93	\$11,965,401	\$4,087,222
Total	--	1,185	\$149,463,028	\$45,651,236

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

In FY 2022, Maryland's A&E Districts supported a total of 1,185 jobs, nearly \$149.5 million in state GDP, and approximately \$45.7 million in employee compensation. As shown in Figure 6 above, economic activity was distributed throughout the state, though district-level activity varied significantly. Data reported by Frederick had the largest effect on Maryland's economy, totaling 234 jobs, \$28.1 million in state GDP, and nearly \$9.0 million in employee

compensation. The Salisbury A&E District in Maryland's Eastern Shore saw the second-largest footprint with 125 jobs, \$20.9 million in state GDP, and \$5.4 million in employee compensation.

As noted previously, these overall footprints are due to attendee spending and net business growth within districts. The following subsections will examine these economic activities on a more granular level.

5.2 Event and Festival Attendee Footprint and Impact

Maryland's A&E Districts were home to 3,137 events and festivals in FY 2022, with reported attendance of approximately 1.2 million.²³ Based on data reported by Americans for the Arts, RESI estimated that approximately 84.9 percent of attendees were Maryland residents, while the other 15.1 percent were visitors from out of state.²⁴ However, since out-of-state visitors tend to have higher spending levels than their in-state counterparts, they accounted for approximately 24.4 percent of attendee spending. On average, in 2021 dollars, each out-of-state visitor spent approximately \$48.52, while each Maryland resident attendee spent approximately \$26.76.²⁵

In FY 2021, there was an uncharacteristically low number of events and festivals, as well as low attendance numbers following the COVID-19 pandemic. In FY 2022, the number of events and festivals that took place in the designated A&E districts started to grow as districts began to recover from the COVID-19 pandemic.²⁶ Below, Figure 7 contains the statewide economic effects associated with attendee spending, presented by the residency of the visitor. Impacts associated with out-of-state visitors represent new dollars flowing into the Maryland economy, spurring additional activity. Footprint figures associated with Maryland residents represent spending that is directed to local economies where A&E districts are located. For impacts at the district level, please see Appendix C.

²³ Please note that for the 27 A&E Districts that reported data, not all could provide exact attendance figures for corresponding events and/or festivals. Therefore, attendance figures are approximate and may be under- or over-counted.

²⁴ Americans for the Arts, "The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences in the State of Maryland," 1.

²⁵ RESI analysis of Americans for the Arts data: Americans for the Arts, "The Economic Impact of Nonprofit Arts and Cultural Organizations and Their Audiences in the State of Maryland," 1.

²⁶ Although direct comparisons should be made with caution, the estimated number of visitors increased from approximately 0.4 million in FY 2021 to 1.2 million in FY 2022, and the estimated number of events and festivals rose from approximately 553 in FY 2021 to 3,137 in FY 2022.

Figure 7: Statewide Economic Footprints of A&E District Event/Festival Attendee Spending, FY 2022

Activity Type	Direct	Indirect	Induced	Total
<i>Out-of-State Visitor Impact</i>				
Employment	97	11	13	123
State GDP	\$7,420,485	\$2,798,684	\$2,780,776	\$12,999,947
Employee Compensation	\$2,733,286	\$826,676	\$822,014	\$4,381,980
<i>In-state Attendee Footprint</i>				
Employment	299	40	41	382
State GDP	\$22,125,358	\$8,905,138	\$7,889,364	\$38,919,862
Employee Compensation	\$7,544,442	\$2,618,090	\$2,332,108	\$12,494,643
<i>Overall Attendee Footprint</i>				
Employment	396	51	54	504
State GDP	\$29,545,843	\$11,703,821	\$10,670,140	\$51,919,808
Employee Compensation	\$10,277,729	\$3,444,767	\$3,154,122	\$16,876,623

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

Overall spending by attendees at events and festivals in Maryland’s A&E Districts in FY 2022 directly supported 396 jobs, approximately \$29.5 million in state GDP, and nearly \$10.3 million in employee compensation. When considering economic activity associated with suppliers to these direct activities, as well as additional spending by employees carrying out these activities, the total footprint grew to 504 jobs, over \$51.9 million in state GDP, and nearly \$16.9 million in employee compensation.

Of particular importance are the out-of-state visitor impacts, as they are the result of new dollars flowing into Maryland’s economy. Their expenditures supported a total of 123 jobs, approximately \$13.0 million in state GDP, and nearly \$4.4 million in employee compensation.

5.3 Net Business Growth Economic Impact

Businesses within Maryland’s A&E Districts contribute to the cultural offerings in their districts and bolster the Maryland economy. Statewide, there was a net growth of 63 retailers, 64 businesses, 35 restaurants, and 26 organizations.²⁷ These net new businesses supported additional economic activity in Maryland’s economy, as presented in Figure 8.

²⁷ In their annual reports, some districts reported employee counts for establishments that opened or closed; for districts that did not provide this information, RESI estimated employee counts based on data from other districts.

Figure 8: Economic Impacts of Net Business Growth in Maryland's A&E Districts, FY 2022

Activity Type	Direct	Indirect	Induced	Total
Employment	460	118	102	681
State GDP	\$54,311,044	\$24,435,617	\$18,796,558	\$97,543,219
Employee Compensation	\$16,336,821	\$6,880,844	\$5,556,948	\$28,774,614

Sources: IMPLAN, MSAC, RESI

In FY 2022, the 460 full-time-equivalent (FTE) workers in Maryland's A&E Districts supported an additional 220 jobs in indirect and induced impacts. Net business growth also resulted in the generation of more than \$28.7 million in employee compensation, and were associated with approximately \$97.5 million in state GDP.

6.0 Tax Revenue Footprints and Impacts

The economic footprints presented in the previous section produced corresponding tax impacts for the State of Maryland. In the cases of net new businesses and spending by out-of-state visitors, taxes paid represent new dollars paid to state coffers. For any taxes paid by Maryland residents, these are not necessarily new tax revenues for the State, but rather represent the footprint or reach of spending associated with A&E Districts. Taxes paid to the State and County as a result of economic activity tied to Maryland's A&E Districts are presented in Figure 9. For impacts at the district level, please see Appendix C—Detailed Economic and Tax Impacts and Footprints.

Figure 9: Total Tax Revenue Footprint of Maryland's A&E Districts, FY 2022

Activity Type	Property	Income	Sales	Payroll	Other	Total
Out-of-State Visitor Impact	\$219,970	\$156,543	\$258,708	\$3,386	\$71,433	\$710,038
In-State Attendee Footprint	\$649,219	\$443,789	\$763,549	\$9,651	\$212,768	\$2,078,977
Business Net Growth Impact	\$1,675,320	\$1,062,922	\$1,970,352	\$22,243	\$557,133	\$5,287,972
Total	\$2,544,509	\$1,663,254	\$2,992,609	\$35,280	\$841,335	\$8,076,987

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

As seen above, state and county governments received nearly \$8.1 million in revenues associated with Maryland's A&E Districts. Property and sales tax revenues were the largest amongst the fiscal impacts, accounting for over \$5.5 million in combined tax revenues. Net business growth was the driver of state and county tax revenue in FY 2022, accounting for approximately 65 percent of the total tax revenue footprint generated by the A&E districts. While the fiscal impact of out-of-state attendees is the smallest of the three activity types, they are especially valuable to Maryland and local governments, as they are associated with new dollars being injected into the state's economy.

7.0 Conclusion

The activity from the 27 reporting A&E districts serve the state by provide a strong sense of cultural enrichment throughout Maryland. From urban hubs such as Baltimore City and the suburbs of Washington, D.C., to the districts gracing the Eastern Shore, the A&E districts foster creativity and economic prosperity. In FY 2022, Maryland’s A&E districts were instrumental in bolstering economic activity throughout the state. The activity associated with the 27 reporting districts resulted in 1,185 jobs and nearly \$149.5 million in state GDP. Furthermore, these districts supported the well-being of their communities by generating nearly \$45.6 million in employee compensation, and an additional \$8.1 million in state and county taxes.

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Appendix A—Methodology

A.1 IMPLAN Model Overview

To quantify the economic and tax impacts of the A&E districts on Maryland, RESI utilized the IMPLAN input/output model. This model enumerates the economic and tax impact of each dollar earned and spent by the following: employees in the district, other supporting vendors (business services, retail, etc.), each dollar spent by these vendors on other firms, and each dollar spent by the households' employees, other vendors' employees, and other businesses' employees.

Economists measure three types of economic impacts: direct, indirect, and induced impacts. The direct economic effects are generated as district entities conduct their operations. The indirect economic impacts occur as district entities purchase goods and services from other firms (for example supplies). As district entities and suppliers to these entities hire workers to complete the tasks, the increases in employment generate an increase in household income, as new job opportunities are created and income levels rise. This drives the induced economic impacts that result from households increasing their purchases at local businesses.

Consider the following example. A new firm opens in a region and directly employs 100 workers. The firm purchases supplies, both from outside the region as well as from local suppliers, which leads to increased business for local firms, thereby hypothetically creating jobs for another 100 workers. This is called the indirect effect. The workers at the firm and at suppliers spend their income mostly in the local area, hypothetically creating jobs for another 50 workers. This is the induced effect. The direct, indirect and induced effects add up to 250 jobs created from the original 100 jobs. Thus, in terms of employment, the total economic impact of the firm in our example is 250.²⁸

This analysis was conducted using the 2021 IMPLAN Model for the state of Maryland, the most-recent data year available. Please note that results generated using models after 2019 cannot be directly compared to results from prior models.

A.2 IMPLAN Modeling Process

Impacts were determined based on two main factors: net business growth and spending by attendees at events and festivals. When data were not available from the districts, RESI estimated attendance and/or employment data based on all of the other district's data.

1. Net business growth within the districts' borders; that is, the increase in employment at firms that opened during FY 2022 less the employment at firms that closed in FY 2022; and
2. Estimated spending by attendees at events and festivals, based on attendance counts provided by the districts in their FY 2022 annual report and visitor spending data published by Americans for the Arts.

²⁸ Total economic impact is defined as the sum of direct, indirect, and induced effects.

Using Maryland-specific attendee spending estimates from Americans from the Arts represents an additional methodological change from prior analyses, which had to rely upon spending estimates from sources that were less representative of conditions in the state. Re-benchmarking these spending estimates has led to a decrease in estimated economic effects. However, this does not mean that Maryland’s A&E Districts are on the decline or are contributing less to Maryland’s economy. Rather, methodological changes prevent direct comparisons to previous analyses.

The IMPLAN Model estimates economic effects based on a set of underlying multipliers aligned to its 546-industry sector scheme. To conduct the analysis, RESI assigned input data to its corresponding IMPLAN industry sector code. IMPLAN codes utilized in the analysis are provided below.

Figure 10: IMPLAN Codes Used in the Analysis

Code	Description
57	Construction of new single-family residential structures
107	Wineries
108	Photographic services
152	Printing
402	Retail - Motor vehicle and parts dealers
403	Retail - Furniture and home furnishings stores
405	Retail - Building material and garden equipment and supplies stores
406	Retail - Food and beverage stores
407	Retail - Health and personal care stores
408	Retail - Gasoline stores
409	Retail - Clothing and clothing accessories stores
410	Retail - Sporting goods, hobby, musical instrument and book stores
411	Retail - General merchandise stores
412	Retail - Miscellaneous store retailers
413	Retail - Nonstore retailers
429	Motion picture and video industries
430	Sound recording industries
439	Nondepository credit intermediation and related activities
440	Securities and commodity contracts intermediation and brokerage
441	Monetary authorities and depository credit intermediation
442	Other financial investment activities
446	Funds, trusts, and other financial vehicles
447	Other real estate
455	Legal services
456	Accounting, tax preparation, bookkeeping, and payroll services
458	Specialized design services
462	Management consulting services

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463	Environmental and other technical consulting services
466	Photographic services
475	Investigation and security services
478	Other support services
479	Waste management and remediation services
480	Elementary and secondary schools
482	Other educational services
483	Offices of physicians
484	Offices of dentists
485	Offices of other health practitioners
486	Outpatient care centers
494	Child day care services
496	Performing arts companies
499	Independent artists, writers, and performers
500	Promoters of performing arts and sports and agents for public figures
501	Museums, historical sites, zoos, and parks
504	Other amusement and recreation industries
505	Fitness and recreational sports centers
507	Hotels and motels, including casino hotels
509	Full-service restaurants
510	Limited-service restaurants
511	All other food and drinking places
512	Automotive repair and maintenance, except car washes
514	Electronic and precision equipment repair and maintenance
517	Personal care services
519	Dry-cleaning and laundry services
520	Other personal services
521	Religious organizations
522	Grantmaking, giving, and social advocacy organizations
524	Labor and civic organizations

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

Two IMPLAN models were created for each district—one for attendee spending and one for net business growth. After the models were run, results for employment effects, state GDP effects, employee compensation effects, and State and County tax revenue effects were exported to Microsoft Excel. Results were aggregated to the district level, and then all districts were aggregated to the state level. Appendix C—Detailed Economic and Tax Impacts and Footprints contains additional detailed impacts.

Appendix B—Glossary

Figure 11: Glossary of Terms

Term	Definition
Economic Impact	This term refers to the changes in the economy resulting from an economic event and activities that support the event. Economic impacts are generated when the economic event is new or would not otherwise occur in the study region.
Economic footprint	This term refers to the additional economic activity supported by an initial activity. This initial activity would have occurred in the study region anyway.
Employment	This term refers to the number of jobs created or supported as a result of district activity which has been modeled in IMPLAN.
Employee Compensation Impact	This term refers to the change in employee compensation (including all salaries and wages, benefits, etc.) associated with the job and state GDP creation resulting from district activity which has been modeled in IMPLAN.
Fiscal/Tax Impact	This term refers to the change in tax revenues resulting from an event. RESI typically reports state and local tax revenues, which are combined in IMPLAN.
IMPLAN	This term refers to the input/output modeling software used to model changes in the economy in a particular region. The user builds a model based on prepackaged economic data from IMPLAN (typically at the state or county level), then enters input figures—an industry change of employment or sales, a household change of income, and/or several other input types—for the industry sectors expected to be impacted as a “scenario.” IMPLAN runs the scenario created in the model and produces the economic and fiscal/tax outputs.
New Businesses	This term refers to all of the businesses which were newly created within an A&E district during the study period according to data provided in the A&E district annual reports. These businesses may include both for-profit and nonprofit entities. The breakout of for-profit and nonprofit businesses cannot be precisely determined from the data provided.
State GDP	This term refers to the economic activity created as a result of district activity that has been modeled in IMPLAN. In other words, it is the market value of all final goods and services produced by the economy of the region being modeled.

Source: RESI

Appendix C—Detailed Economic and Tax Impacts and Footprints

This section provides detailed impact and footprint data at the district level.

C.1 Employment

Figure 12: Out-of-state Visitor Employment Impacts

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	13	2	2	17
Berlin	5	1	1	7
Bethesda	2	0	0	2
Bromo	0	0	0	0
Cambridge	1	0	0	1
Catonsville	7	1	1	9
Chestertown	4	1	1	5
Crisfield	0	0	0	0
Cumberland	1	0	0	2
Denton	1	0	0	1
Easton	N/R	N/R	N/R	N/R
Elkton	2	0	0	2
Frederick	19	3	3	25
Frostburg	2	0	0	3
Gateway	0	0	0	0
Grantsville	1	0	0	1
Hagerstown	2	0	0	2
Havre de Grace	4	0	1	5
Highlandtown	4	0	1	5
Leonardtwn	4	0	1	5
Oakland	2	0	0	2
Pennsylvania Ave.	0	0	0	0
Salisbury	10	1	1	13
Silver Spring	0	0	0	0
Snow Hill	1	0	0	1
Station North	4	1	1	6
Stevensville	1	0	0	1
Wheaton	6	1	1	7
Total	97	11	13	123

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

Figure 13: In-state Attendee Employment Footprint

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	40	6	6	52
Berlin	16	2	2	20
Bethesda	5	1	1	7
Bromo	1	0	0	1
Cambridge	3	0	0	3
Catonsville	23	3	3	29
Chestertown	13	2	2	17
Crisfield	1	0	0	1
Cumberland	4	1	1	6
Denton	2	0	0	2
Easton	N/R	N/R	N/R	N/R
Elkton	5	1	1	6
Frederick	60	8	9	77
Frostburg	6	1	1	8
Gateway	0	0	0	0
Grantsville	2	0	0	3
Hagerstown	5	1	1	7
Havre de Grace	12	2	2	16
Highlandtown	13	2	2	17
Leonardtwn	13	2	2	16
Oakland	6	1	1	8
Pennsylvania Ave.	0	0	0	0
Salisbury	30	4	4	38
Silver Spring	0	0	0	0
Snow Hill	4	0	0	5
Station North	14	2	2	18
Stevensville	2	0	0	3
Wheaton	17	2	2	22
Total	299	40	41	382

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

Figure 14: Overall Attendee (Out-of-state and In-state) Employment Footprint

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	53	7	8	69
Berlin	21	3	3	27
Bethesda	7	1	1	9
Bromo	1	0	0	1
Cambridge	3	0	0	4
Catonsville	30	4	4	38
Chestertown	18	2	2	22
Crisfield	2	0	0	2
Cumberland	6	1	1	7
Denton	3	0	0	3
Easton	N/R	N/R	N/R	N/R
Elkton	6	1	1	8
Frederick	79	11	12	102
Frostburg	8	1	1	10
Gateway	0	0	0	0
Grantsville	3	0	0	4
Hagerstown	7	1	1	9
Havre de Grace	16	2	2	21
Highlandtown	17	2	2	22
Leonardtwn	17	2	2	22
Oakland	8	1	1	10
Pennsylvania Ave.	0	0	0	0
Salisbury	40	5	6	51
Silver Spring	0	0	0	0
Snow Hill	5	1	0	6
Station North	18	2	3	23
Stevensville	3	0	0	4
Wheaton	23	3	3	29
Total	396	51	54	504

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

Figure 15: Net Business Growth Employment Impacts

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	32	7	7	46
Berlin	6	3	2	11
Bethesda	32	9	8	49
Bromo	26	5	5	35
Cambridge	2	0	0	2
Catonsville	4	0	0	4
Chestertown	15	3	3	21
Crisfield	1	1	0	2
Cumberland	18	4	4	27
Denton	0	0	0	0
Easton	5	1	0	6
Elkton	4	1	1	6
Frederick	91	22	19	131
Frostburg	10	1	2	13
Gateway	0	0	0	0
Grantsville	0	0	0	0
Hagerstown	48	8	9	65
Havre de Grace	1	1	0	2
Highlandtown	7	5	2	14
Leonardtwn	3	0	-1	3
Oakland	-1	0	0	0
Pennsylvania Ave.	0	0	0	0
Salisbury	37	23	15	75
Silver Spring	46	8	8	63
Snow Hill	4	-1	0	3
Station North	10	3	2	15
Stevensville	16	3	4	23
Wheaton	44	10	11	64
Total	460	118	102	681

Sources: IMPLAN, MSAC, RESI

Figure 16: Full Employment Footprint for Maryland's A&E Districts, FY 2022

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	85	15	14	115
Berlin	27	6	5	38
Bethesda	39	10	9	58
Bromo	27	5	5	36
Cambridge	5	0	0	7
Catonsville	34	4	5	43
Chestertown	33	5	5	44
Crisfield	3	1	0	4
Cumberland	24	5	5	34
Denton	3	0	0	3
Easton	5	1	0	6
Elkton	10	2	2	14
Frederick	170	33	30	234
Frostburg	18	2	3	24
Gateway	0	0	0	0
Grantsville	3	0	0	4
Hagerstown	55	9	10	74
Havre de Grace	17	3	3	23
Highlandtown	24	7	4	36
Leonardtwn	20	2	2	24
Oakland	8	1	1	10
Pennsylvania Ave.	0	0	0	0
Salisbury	77	28	20	125
Silver Spring	46	8	8	63
Snow Hill	9	0	0	9
Station North	28	5	5	39
Stevensville	19	4	4	27
Wheaton	67	13	14	93
Total	855	169	156	1,185

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

C.2 Output or State GDP

Figure 17: Out-of-state Visitor Spending State GDP Impacts, FY 2022

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$1,001,435	\$377,698	\$375,281	\$1,754,413
Berlin	\$395,702	\$149,241	\$148,286	\$693,229
Bethesda	\$134,209	\$50,618	\$50,294	\$235,120
Bromo	\$18,136	\$6,840	\$6,796	\$31,773
Cambridge	\$62,653	\$23,630	\$23,479	\$109,761
Catonsville	\$563,967	\$212,704	\$211,343	\$988,014
Chestertown	\$329,507	\$124,276	\$123,481	\$577,264
Crisfield	\$30,950	\$11,673	\$11,598	\$54,222
Cumberland	\$110,500	\$41,676	\$41,409	\$193,584
Denton	\$50,914	\$19,202	\$19,079	\$89,195
Easton	N/R	N/R	N/R	N/R
Elkton	\$118,216	\$44,586	\$44,301	\$207,102
Frederick	\$1,488,761	\$561,496	\$557,903	\$2,608,160
Frostburg	\$156,764	\$59,124	\$58,746	\$274,634
Gateway	\$0	\$0	\$0	\$0
Grantsville	\$55,233	\$20,832	\$20,698	\$96,763
Hagerstown	\$132,270	\$49,886	\$49,567	\$231,723
Havre de Grace	\$309,307	\$116,657	\$115,911	\$541,874
Highlandtown	\$326,394	\$123,102	\$122,314	\$571,810
Leonardtwn	\$319,430	\$120,475	\$119,704	\$559,609
Oakland	\$153,005	\$57,707	\$57,337	\$268,049
Pennsylvania Ave.	\$0	\$0	\$0	\$0
Salisbury	\$743,062	\$280,251	\$278,457	\$1,301,769
Silver Spring	\$0	\$0	\$0	\$0
Snow Hill	\$94,474	\$35,631	\$35,403	\$165,509
Station North	\$340,897	\$128,572	\$127,749	\$597,217
Stevensville	\$58,201	\$21,951	\$21,810	\$101,962
Wheaton	\$426,500	\$160,857	\$159,828	\$747,186
Total	\$7,420,485	\$2,798,684	\$2,780,776	\$12,999,947

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

FY 2022 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 18: In-state Visitor Spending State GDP Impacts, FY 2022

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$2,985,937	\$1,201,797	\$1,064,713	\$5,252,447
Berlin	\$1,179,847	\$474,872	\$420,705	\$2,075,423
Bethesda	\$400,165	\$161,061	\$142,689	\$703,914
Bromo	\$54,076	\$21,765	\$19,282	\$95,124
Cambridge	\$186,809	\$75,188	\$66,612	\$328,609
Catonsville	\$1,681,557	\$676,803	\$599,603	\$2,957,962
Chestertown	\$982,478	\$395,433	\$350,328	\$1,728,240
Crisfield	\$92,284	\$37,143	\$32,906	\$162,333
Cumberland	\$329,472	\$132,608	\$117,482	\$579,562
Denton	\$151,807	\$61,100	\$54,131	\$267,038
Easton	N/R	N/R	N/R	N/R
Elkton	\$352,479	\$141,868	\$125,686	\$620,033
Frederick	\$4,438,978	\$1,786,625	\$1,582,832	\$7,808,435
Frostburg	\$467,416	\$188,128	\$166,669	\$822,214
Gateway	\$0	\$0	\$0	\$0
Grantsville	\$164,687	\$66,284	\$58,723	\$289,694
Hagerstown	\$394,384	\$158,734	\$140,628	\$693,745
Havre de Grace	\$922,247	\$371,191	\$328,851	\$1,622,289
Highlandtown	\$973,197	\$391,698	\$347,018	\$1,711,913
Leonardtwn	\$952,432	\$383,340	\$339,614	\$1,675,386
Oakland	\$456,208	\$183,617	\$162,673	\$802,497
Pennsylvania Ave.	\$0	\$0	\$0	\$0
Salisbury	\$2,215,556	\$891,730	\$790,014	\$3,897,299
Silver Spring	\$0	\$0	\$0	\$0
Snow Hill	\$281,688	\$113,376	\$100,443	\$495,507
Station North	\$1,016,438	\$409,102	\$362,437	\$1,787,977
Stevensville	\$173,536	\$69,846	\$61,879	\$305,260
Wheaton	\$1,271,679	\$511,832	\$453,450	\$2,236,961
Total	\$22,125,358	\$8,905,138	\$7,889,364	\$38,919,862

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

FY 2022 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 19: Overall Visitor Spending State GDP Impacts, FY 2022

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$3,987,372	\$1,579,495	\$1,439,994	\$7,006,861
Berlin	\$1,575,549	\$624,113	\$568,991	\$2,768,653
Bethesda	\$534,374	\$211,678	\$192,983	\$939,035
Bromo	\$72,213	\$28,605	\$26,079	\$126,897
Cambridge	\$249,462	\$98,818	\$90,090	\$438,370
Catonsville	\$2,245,524	\$889,507	\$810,945	\$3,945,976
Chestertown	\$1,311,986	\$519,709	\$473,808	\$2,305,504
Crisfield	\$123,234	\$48,816	\$44,505	\$216,555
Cumberland	\$439,972	\$174,284	\$158,891	\$773,146
Denton	\$202,721	\$80,302	\$73,210	\$356,233
Easton	N/R	N/R	N/R	N/R
Elkton	\$470,695	\$186,454	\$169,986	\$827,135
Frederick	\$5,927,739	\$2,348,121	\$2,140,735	\$10,416,595
Frostburg	\$624,180	\$247,253	\$225,415	\$1,096,848
Gateway	\$0	\$0	\$0	\$0
Grantsville	\$219,920	\$87,116	\$79,422	\$386,458
Hagerstown	\$526,653	\$208,620	\$190,195	\$925,468
Havre de Grace	\$1,231,554	\$487,848	\$444,762	\$2,164,164
Highlandtown	\$1,299,591	\$514,799	\$469,332	\$2,283,723
Leonardtwn	\$1,271,862	\$503,815	\$459,318	\$2,234,995
Oakland	\$609,212	\$241,324	\$220,010	\$1,070,546
Pennsylvania Ave.	\$0	\$0	\$0	\$0
Salisbury	\$2,958,618	\$1,171,980	\$1,068,471	\$5,199,069
Silver Spring	\$0	\$0	\$0	\$0
Snow Hill	\$376,162	\$149,007	\$135,847	\$661,016
Station North	\$1,357,335	\$537,673	\$490,186	\$2,385,194
Stevensville	\$231,737	\$91,796	\$83,689	\$407,223
Wheaton	\$1,698,179	\$672,690	\$613,278	\$2,984,146
Total	\$29,545,843	\$11,703,821	\$10,670,140	\$51,919,808

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

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Figure 20: Net Business Growth State GDP Impacts, FY 2022

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$2,883,979	\$1,521,847	\$1,219,924	\$5,625,750
Berlin	\$1,671,148	\$736,728	\$379,344	\$2,787,220
Bethesda	\$3,493,515	\$1,842,336	\$1,417,023	\$6,752,874
Bromo	\$2,302,631	\$867,436	\$861,128	\$4,031,194
Cambridge	\$128,754	\$56,288	\$54,395	\$239,437
Catonsville	\$145,207	\$59,616	\$105,174	\$309,997
Chestertown	\$1,994,118	\$661,076	\$559,833	\$3,215,027
Crisfield	\$286,025	\$179,812	\$58,123	\$523,960
Cumberland	\$1,990,724	\$798,662	\$792,856	\$3,582,242
Denton	\$0	\$0	\$0	\$0
Easton	\$325,235	\$191,743	\$102,842	\$619,819
Elkton	\$583,474	\$240,922	\$194,122	\$1,018,517
Frederick	\$9,752,095	\$4,569,682	\$3,403,478	\$17,725,254
Frostburg	\$846,652	\$302,239	\$338,585	\$1,487,476
Gateway	\$0	\$0	\$0	\$0
Grantsville	\$0	\$0	\$0	\$0
Hagerstown	\$4,567,554	\$1,595,682	\$1,716,367	\$7,879,604
Havre de Grace	\$329,536	\$202,252	\$73,488	\$605,275
Highlandtown	\$1,541,664	\$1,003,032	\$382,384	\$2,927,081
Leonardtwn	-\$15,214	\$60,368	-\$115,981	-\$70,827
Oakland	\$57,064	\$62,303	-\$9,133	\$110,234
Pennsylvania Ave.	\$0	\$0	\$0	\$0
Salisbury	\$8,280,685	\$4,737,330	\$2,687,327	\$15,705,343
Silver Spring	\$4,866,794	\$1,722,579	\$1,538,059	\$8,127,432
Snow Hill	-\$186,373	-\$133,905	-\$59,650	-\$379,929
Station North	\$1,463,700	\$578,554	\$436,721	\$2,478,975
Stevensville	\$1,865,812	\$655,764	\$738,431	\$3,260,007
Wheaton	\$5,136,265	\$1,923,271	\$1,921,719	\$8,981,255
Total	\$54,311,044	\$24,435,617	\$18,796,558	\$97,543,219

Sources: IMPLAN, MSAC, RESI

FY 2022 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 21: Full State GDP Footprint for Maryland's A&E Districts, FY 2022

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$6,871,351	\$3,101,342	\$2,659,917	\$12,632,611
Berlin	\$3,246,697	\$1,360,841	\$948,335	\$5,555,873
Bethesda	\$4,027,888	\$2,054,015	\$1,610,006	\$7,691,909
Bromo	\$2,374,843	\$896,041	\$887,206	\$4,158,091
Cambridge	\$378,216	\$155,106	\$144,485	\$677,807
Catonsville	\$2,390,731	\$949,122	\$916,120	\$4,255,973
Chestertown	\$3,306,104	\$1,180,785	\$1,033,642	\$5,520,530
Crisfield	\$409,259	\$228,628	\$102,627	\$740,515
Cumberland	\$2,430,696	\$972,946	\$951,747	\$4,355,389
Denton	\$202,721	\$80,302	\$73,210	\$356,233
Easton	\$325,235	\$191,743	\$102,842	\$619,819
Elkton	\$1,054,169	\$427,375	\$364,108	\$1,845,652
Frederick	\$15,679,834	\$6,917,803	\$5,544,212	\$28,141,849
Frostburg	\$1,470,832	\$549,492	\$564,000	\$2,584,324
Gateway	\$0	\$0	\$0	\$0
Grantsville	\$219,920	\$87,116	\$79,422	\$386,458
Hagerstown	\$5,094,208	\$1,804,302	\$1,906,562	\$8,805,072
Havre de Grace	\$1,561,090	\$690,100	\$518,249	\$2,769,439
Highlandtown	\$2,841,256	\$1,517,832	\$851,717	\$5,210,804
Leonardtwn	\$1,256,648	\$564,184	\$343,337	\$2,164,168
Oakland	\$666,276	\$303,626	\$210,877	\$1,180,779
Pennsylvania Ave.	\$0	\$0	\$0	\$0
Salisbury	\$11,239,303	\$5,909,310	\$3,755,798	\$20,904,411
Silver Spring	\$4,866,794	\$1,722,579	\$1,538,059	\$8,127,432
Snow Hill	\$189,789	\$15,102	\$76,196	\$281,087
Station North	\$2,821,035	\$1,116,227	\$926,907	\$4,864,170
Stevensville	\$2,097,549	\$747,561	\$822,120	\$3,667,229
Wheaton	\$6,834,444	\$2,595,960	\$2,534,997	\$11,965,401
Total	\$83,856,887	\$36,139,438	\$29,466,699	\$149,463,028

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

C.3 Employee Compensation

Figure 22: Out-of-state Visitor Spending Employee Compensation Impacts, FY 2022

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$368,872	\$111,565	\$110,935	\$591,372
Berlin	\$145,754	\$44,083	\$43,834	\$233,672
Bethesda	\$49,435	\$14,951	\$14,867	\$79,254
Bromo	\$6,680	\$2,020	\$2,009	\$10,710
Cambridge	\$23,078	\$6,980	\$6,940	\$36,998
Catonsville	\$207,733	\$62,829	\$62,474	\$333,037
Chestertown	\$121,372	\$36,709	\$36,502	\$194,582
Crisfield	\$11,400	\$3,448	\$3,429	\$18,277
Cumberland	\$40,702	\$12,310	\$12,241	\$65,253
Denton	\$18,754	\$5,672	\$5,640	\$30,066
Easton	N/R	N/R	N/R	N/R
Elkton	\$43,544	\$13,170	\$13,096	\$69,809
Frederick	\$548,375	\$165,855	\$164,920	\$879,151
Frostburg	\$57,743	\$17,464	\$17,366	\$92,573
Gateway	\$0	\$0	\$0	\$0
Grantsville	\$20,345	\$6,153	\$6,118	\$32,617
Hagerstown	\$48,721	\$14,735	\$14,652	\$78,109
Havre de Grace	\$113,931	\$34,458	\$34,264	\$182,653
Highlandtown	\$120,225	\$36,362	\$36,157	\$192,744
Leonardtwn	\$117,660	\$35,586	\$35,385	\$188,631
Oakland	\$56,358	\$17,045	\$16,949	\$90,353
Pennsylvania Ave.	\$0	\$0	\$0	\$0
Salisbury	\$273,702	\$82,781	\$82,314	\$438,796
Silver Spring	\$0	\$0	\$0	\$0
Snow Hill	\$34,799	\$10,525	\$10,465	\$55,789
Station North	\$125,567	\$37,978	\$37,763	\$201,308
Stevensville	\$21,438	\$6,484	\$6,447	\$34,369
Wheaton	\$157,099	\$47,514	\$47,246	\$251,859
Total	\$2,733,286	\$826,676	\$822,014	\$4,381,980

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

FY 2022 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 23: In-state Attendee Spending Employee Compensation Footprint, FY 2022

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$1,018,164	\$353,326	\$314,731	\$1,686,220
Berlin	\$402,312	\$139,611	\$124,361	\$666,284
Bethesda	\$136,451	\$47,351	\$42,179	\$225,981
Bromo	\$18,439	\$6,399	\$5,700	\$30,538
Cambridge	\$63,699	\$22,105	\$19,690	\$105,495
Catonsville	\$573,388	\$198,979	\$177,244	\$949,610
Chestertown	\$335,012	\$116,257	\$103,558	\$554,826
Crisfield	\$31,467	\$10,920	\$9,727	\$52,114
Cumberland	\$112,346	\$38,986	\$34,728	\$186,060
Denton	\$51,764	\$17,963	\$16,001	\$85,728
Easton	N/R	N/R	N/R	N/R
Elkton	\$120,191	\$41,709	\$37,153	\$199,052
Frederick	\$1,513,630	\$525,264	\$467,888	\$2,506,782
Frostburg	\$159,382	\$55,309	\$49,268	\$263,960
Gateway	\$0	\$0	\$0	\$0
Grantsville	\$56,156	\$19,487	\$17,359	\$93,002
Hagerstown	\$134,479	\$46,667	\$41,570	\$222,716
Havre de Grace	\$314,474	\$109,129	\$97,209	\$520,812
Highlandtown	\$331,847	\$115,158	\$102,579	\$549,584
Leonardtwn	\$324,766	\$112,701	\$100,390	\$537,858
Oakland	\$155,560	\$53,983	\$48,086	\$257,630
Pennsylvania Ave.	\$0	\$0	\$0	\$0
Salisbury	\$755,474	\$262,167	\$233,529	\$1,251,170
Silver Spring	\$0	\$0	\$0	\$0
Snow Hill	\$96,052	\$33,332	\$29,691	\$159,075
Station North	\$346,591	\$120,275	\$107,137	\$574,004
Stevensville	\$59,173	\$20,534	\$18,291	\$97,999
Wheaton	\$433,625	\$150,478	\$134,040	\$718,143
Total	\$7,544,442	\$2,618,090	\$2,332,108	\$12,494,643

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

FY 2022 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 24: Overall Attendee Spending Employee Compensation Footprint, FY 2022

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$1,387,035	\$464,890	\$425,666	\$2,277,592
Berlin	\$548,066	\$183,694	\$168,195	\$899,955
Bethesda	\$185,886	\$62,303	\$57,046	\$305,235
Bromo	\$25,120	\$8,419	\$7,709	\$41,248
Cambridge	\$86,777	\$29,085	\$26,631	\$142,493
Catonsville	\$781,121	\$261,807	\$239,718	\$1,282,646
Chestertown	\$456,383	\$152,965	\$140,059	\$749,408
Crisfield	\$42,868	\$14,368	\$13,155	\$70,391
Cumberland	\$153,047	\$51,296	\$46,968	\$251,313
Denton	\$70,518	\$23,635	\$21,641	\$115,794
Easton	N/R	N/R	N/R	N/R
Elkton	\$163,735	\$54,879	\$50,248	\$268,862
Frederick	\$2,062,006	\$691,119	\$632,808	\$3,385,932
Frostburg	\$217,125	\$72,773	\$66,633	\$356,532
Gateway	\$0	\$0	\$0	\$0
Grantsville	\$76,501	\$25,640	\$23,477	\$125,619
Hagerstown	\$183,200	\$61,403	\$56,222	\$300,825
Havre de Grace	\$428,405	\$143,588	\$131,473	\$703,465
Highlandtown	\$452,072	\$151,520	\$138,736	\$742,328
Leonardtwn	\$442,426	\$148,287	\$135,776	\$726,489
Oakland	\$211,919	\$71,028	\$65,035	\$347,983
Pennsylvania Ave.	\$0	\$0	\$0	\$0
Salisbury	\$1,029,176	\$344,947	\$315,843	\$1,689,966
Silver Spring	\$0	\$0	\$0	\$0
Snow Hill	\$130,851	\$43,857	\$40,157	\$214,864
Station North	\$472,159	\$158,253	\$144,900	\$775,312
Stevensville	\$80,611	\$27,018	\$24,738	\$132,368
Wheaton	\$590,723	\$197,992	\$181,287	\$970,002
Total	\$10,277,729	\$3,444,767	\$3,154,122	\$16,876,623

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

FY 2022 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 25: Net Business Growth Employee Compensation Impacts, FY 2022

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$1,053,480	\$393,254	\$360,696	\$1,807,430
Berlin	\$257,107	\$194,166	\$112,160	\$563,433
Bethesda	\$1,051,972	\$540,317	\$419,032	\$2,011,321
Bromo	\$846,806	\$238,206	\$254,566	\$1,339,578
Cambridge	\$48,677	\$14,882	\$16,084	\$79,642
Catonsville	\$128,542	\$19,414	\$31,082	\$179,037
Chestertown	\$572,336	\$199,214	\$165,453	\$937,003
Crisfield	\$8,925	\$43,085	\$17,197	\$69,207
Cumberland	\$757,791	\$234,059	\$234,388	\$1,226,238
Denton	\$0	\$0	\$0	\$0
Easton	\$63,500	\$46,470	\$30,416	\$140,386
Elkton	\$161,256	\$63,529	\$57,399	\$282,184
Frederick	\$3,206,577	\$1,356,955	\$1,005,962	\$5,569,494
Frostburg	\$365,746	\$91,449	\$100,072	\$557,267
Gateway	\$0	\$0	\$0	\$0
Grantsville	\$0	\$0	\$0	\$0
Hagerstown	\$1,771,916	\$490,560	\$507,326	\$2,769,801
Havre de Grace	-\$4,615	\$41,260	\$21,762	\$58,406
Highlandtown	\$104,449	\$242,553	\$113,132	\$460,133
Leonardtwn	-\$238,770	\$7,992	-\$34,238	-\$265,016
Oakland	-\$27,611	\$12,743	-\$2,698	-\$17,565
Pennsylvania Ave.	\$0	\$0	\$0	\$0
Salisbury	\$1,722,467	\$1,211,296	\$794,725	\$3,728,487
Silver Spring	\$1,443,254	\$499,918	\$454,681	\$2,397,853
Snow Hill	-\$67,342	-\$55,367	-\$17,602	-\$140,312
Station North	\$410,583	\$185,819	\$129,070	\$725,472
Stevensville	\$758,815	\$200,824	\$218,275	\$1,177,914
Wheaton	\$1,940,963	\$608,248	\$568,009	\$3,117,220
Total	\$16,336,821	\$6,880,844	\$5,556,948	\$28,774,614

Sources: IMPLAN, MSAC, RESI

FY 2022 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 26: Full Employee Compensation Footprint of Maryland's A&E Districts, FY 2022

District	Direct	Indirect	Induced	Total
Annapolis	N/R	N/R	N/R	N/R
Bel Air	\$2,440,515	\$858,145	\$786,363	\$4,085,023
Berlin	\$805,173	\$377,860	\$280,355	\$1,463,388
Bethesda	\$1,237,858	\$602,619	\$476,078	\$2,316,556
Bromo	\$871,925	\$246,625	\$262,274	\$1,380,825
Cambridge	\$135,454	\$43,967	\$42,714	\$222,135
Catonsville	\$909,663	\$281,221	\$270,799	\$1,461,684
Chestertown	\$1,028,719	\$352,179	\$305,512	\$1,686,411
Crisfield	\$51,793	\$57,453	\$30,352	\$139,598
Cumberland	\$910,838	\$285,355	\$281,357	\$1,477,550
Denton	\$70,518	\$23,635	\$21,641	\$115,794
Easton	\$63,500.11	\$46,469.78	\$30,415.71	\$140,385.72
Elkton	\$324,991	\$118,408	\$107,647	\$551,046
Frederick	\$5,268,582	\$2,048,074	\$1,638,770	\$8,955,426
Frostburg	\$582,871	\$164,223	\$166,705	\$913,799
Gateway	\$0	\$0	\$0	\$0
Grantsville	\$76,501	\$25,640	\$23,477	\$125,619
Hagerstown	\$1,955,116	\$551,963	\$563,548	\$3,070,626
Havre de Grace	\$423,789	\$184,847	\$153,234	\$761,871
Highlandtown	\$556,521	\$394,073	\$251,867	\$1,202,461
Leonardtwn	\$203,656	\$156,279	\$101,537	\$461,473
Oakland	\$184,308	\$83,771	\$62,338	\$330,417
Pennsylvania Ave.	\$0	\$0	\$0	\$0
Salisbury	\$2,751,643	\$1,556,243	\$1,110,568	\$5,418,453
Silver Spring	\$1,443,254	\$499,918	\$454,681	\$2,397,853
Snow Hill	\$63,508	-\$11,510	\$22,555	\$74,553
Station North	\$882,741	\$344,071	\$273,971	\$1,500,783
Stevensville	\$839,426	\$227,842	\$243,014	\$1,310,282
Wheaton	\$2,531,686	\$806,240	\$749,296	\$4,087,222
Total	\$26,614,550	\$10,325,611	\$8,711,070	\$45,651,236

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

FY 2022 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

C.4 State and County Tax Revenue Footprint

Figure 27: Total State and County Tax Impacts of Out-of-State Visitor Spending, FY 2022

District	Property	Income	Sales	Payroll	Other	Total
Annapolis	N/R	N/R	N/R	N/R	N/R	N/R
Bel Air	\$29,686	\$21,126	\$34,914	\$457	\$9,640	\$95,824
Berlin	\$11,730	\$8,348	\$13,796	\$181	\$3,809	\$37,863
Bethesda	\$3,978	\$2,831	\$4,679	\$61	\$1,292	\$12,842
Bromo	\$538	\$383	\$632	\$8	\$175	\$1,735
Cambridge	\$1,857	\$1,322	\$2,184	\$29	\$603	\$5,995
Catonsville	\$16,718	\$11,897	\$19,662	\$257	\$5,429	\$53,964
Chestertown	\$9,768	\$6,951	\$11,488	\$150	\$3,172	\$31,529
Crisfield	\$917	\$653	\$1,079	\$14	\$298	\$2,962
Cumberland	\$3,276	\$2,331	\$3,852	\$50	\$1,064	\$10,573
Denton	\$1,509	\$1,074	\$1,775	\$23	\$490	\$4,872
Easton	N/R	N/R	N/R	N/R	N/R	N/R
Elkton	\$3,504	\$2,494	\$4,121	\$54	\$1,138	\$11,312
Frederick	\$44,132	\$31,407	\$51,904	\$679	\$14,331	\$142,454
Frostburg	\$4,647	\$3,307	\$5,465	\$72	\$1,509	\$15,000
Gateway	\$0	\$0	\$0	\$0	\$0	\$0
Grantsville	\$1,637	\$1,165	\$1,926	\$25	\$532	\$5,285
Hagerstown	\$3,921	\$2,790	\$4,611	\$60	\$1,273	\$12,656
Havre de Grace	\$9,169	\$6,525	\$10,784	\$141	\$2,978	\$29,596
Highlandtown	\$9,675	\$6,886	\$11,379	\$149	\$3,142	\$31,231
Leonardtown	\$9,469	\$6,739	\$11,137	\$146	\$3,075	\$30,565
Oakland	\$4,536	\$3,228	\$5,334	\$70	\$1,473	\$14,640
Pennsylvania Ave.	\$0	\$0	\$0	\$0	\$0	\$0
Salisbury	\$22,027	\$15,676	\$25,906	\$339	\$7,153	\$71,101
Silver Spring	\$0	\$0	\$0	\$0	\$0	\$0
Snow Hill	\$2,801	\$1,993	\$3,294	\$43	\$909	\$9,040
Station North	\$10,105	\$7,192	\$11,885	\$156	\$3,282	\$32,619
Stevensville	\$1,725	\$1,228	\$2,029	\$27	\$560	\$5,569
Wheaton	\$12,643	\$8,997	\$14,869	\$195	\$4,106	\$40,810
Total	\$219,970	\$156,543	\$258,708	\$3,386	\$71,433	\$710,038

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

FY 2022 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 28: Total State and County Tax Footprint of In-state Visitor Spending, FY 2022

District	Property	Income	Sales	Payroll	Other	Total
Annapolis	N/R	N/R	N/R	N/R	N/R	N/R
Bel Air	\$87,616	\$59,892	\$103,045	\$1,303	\$28,714	\$280,569
Berlin	\$34,620	\$23,665	\$40,717	\$515	\$11,346	\$110,863
Bethesda	\$11,742	\$8,026	\$13,810	\$175	\$3,848	\$37,601
Bromo	\$1,587	\$1,085	\$1,866	\$24	\$520	\$5,081
Cambridge	\$5,482	\$3,747	\$6,447	\$81	\$1,796	\$17,553
Catonsville	\$49,342	\$33,729	\$58,031	\$734	\$16,171	\$158,005
Chestertown	\$28,829	\$19,707	\$33,905	\$429	\$9,448	\$92,317
Crisfield	\$2,708	\$1,851	\$3,185	\$40	\$887	\$8,671
Cumberland	\$9,668	\$6,609	\$11,370	\$144	\$3,168	\$30,958
Denton	\$4,454	\$3,045	\$5,239	\$66	\$1,460	\$14,264
Easton	N/R	N/R	N/R	N/R	N/R	N/R
Elkton	\$10,343	\$7,070	\$12,164	\$154	\$3,390	\$33,120
Frederick	\$130,252	\$89,037	\$153,190	\$1,936	\$42,687	\$417,102
Frostburg	\$13,715	\$9,375	\$16,131	\$204	\$4,495	\$43,920
Gateway	\$0	\$0	\$0	\$0	\$0	\$0
Grantsville	\$4,832	\$3,303	\$5,683	\$72	\$1,584	\$15,475
Hagerstown	\$11,572	\$7,911	\$13,610	\$172	\$3,793	\$37,058
Havre de Grace	\$27,061	\$18,498	\$31,827	\$402	\$8,869	\$86,658
Highlandtown	\$28,556	\$19,520	\$33,585	\$425	\$9,359	\$91,445
Leonardtwn	\$27,947	\$19,104	\$32,869	\$415	\$9,159	\$89,494
Oakland	\$13,386	\$9,151	\$15,744	\$199	\$4,387	\$42,867
Pennsylvania Ave.	\$0	\$0	\$0	\$0	\$0	\$0
Salisbury	\$65,011	\$44,440	\$76,459	\$966	\$21,306	\$208,182
Silver Spring	\$0	\$0	\$0	\$0	\$0	\$0
Snow Hill	\$8,266	\$5,650	\$9,721	\$123	\$2,709	\$26,468
Station North	\$29,825	\$20,388	\$35,077	\$443	\$9,775	\$95,508
Stevensville	\$5,092	\$3,481	\$5,989	\$76	\$1,669	\$16,306
Wheaton	\$37,315	\$25,507	\$43,886	\$555	\$12,229	\$119,491
Total	\$649,219	\$443,789	\$763,549	\$9,651	\$212,768	\$2,078,977

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

FY 2022 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 29: Total State and County Tax Footprint of All Attendee Spending, FY 2022

District	Property	Income	Sales	Payroll	Other	Total
Annapolis	N/R	N/R	N/R	N/R	N/R	N/R
Bel Air	\$117,302	\$81,018	\$137,959	\$1,759	\$38,354	\$376,393
Berlin	\$46,350	\$32,013	\$54,512	\$695	\$15,155	\$148,726
Bethesda	\$15,720	\$10,858	\$18,489	\$236	\$5,140	\$50,443
Bromo	\$2,124	\$1,467	\$2,498	\$32	\$695	\$6,817
Cambridge	\$7,339	\$5,069	\$8,631	\$110	\$2,400	\$23,548
Catonsville	\$66,060	\$45,626	\$77,693	\$991	\$21,600	\$211,969
Chestertown	\$38,596	\$26,658	\$45,393	\$579	\$12,620	\$123,846
Crisfield	\$3,625	\$2,504	\$4,264	\$54	\$1,185	\$11,633
Cumberland	\$12,943	\$8,940	\$15,223	\$194	\$4,232	\$41,532
Denton	\$5,964	\$4,119	\$7,014	\$89	\$1,950	\$19,136
Easton	N/R	N/R	N/R	N/R	N/R	N/R
Elkton	\$13,847	\$9,564	\$16,286	\$208	\$4,528	\$44,432
Frederick	\$174,384	\$120,444	\$205,094	\$2,616	\$57,019	\$559,556
Frostburg	\$18,362	\$12,683	\$21,596	\$275	\$6,004	\$58,920
Gateway	\$0	\$0	\$0	\$0	\$0	\$0
Grantsville	\$6,470	\$4,468	\$7,609	\$97	\$2,115	\$20,760
Hagerstown	\$15,493	\$10,701	\$18,222	\$232	\$5,066	\$49,714
Havre de Grace	\$36,230	\$25,024	\$42,611	\$543	\$11,846	\$116,254
Highlandtown	\$38,232	\$26,406	\$44,965	\$573	\$12,501	\$122,676
Leonardtwn	\$37,416	\$25,843	\$44,005	\$561	\$12,234	\$120,059
Oakland	\$17,922	\$12,378	\$21,078	\$269	\$5,860	\$57,507
Pennsylvania Ave.	\$0	\$0	\$0	\$0	\$0	\$0
Salisbury	\$87,038	\$60,115	\$102,365	\$1,305	\$28,459	\$279,282
Silver Spring	\$0	\$0	\$0	\$0	\$0	\$0
Snow Hill	\$11,066	\$7,643	\$13,015	\$166	\$3,618	\$35,508
Station North	\$39,931	\$27,579	\$46,962	\$599	\$13,056	\$128,127
Stevensville	\$6,817	\$4,709	\$8,018	\$102	\$2,229	\$21,875
Wheaton	\$49,958	\$34,505	\$58,755	\$749	\$16,335	\$160,302
Total	\$869,189	\$600,332	\$1,022,257	\$13,037	\$284,201	\$2,789,016

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

FY 2022 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 30: Total State and County Tax Impact of Net Business Growth, FY 2022

District	Property	Income	Sales	Payroll	Other	Total
Annapolis	N/R	N/R	N/R	N/R	N/R	N/R
Bel Air	\$124,096	\$69,347	\$145,949	\$1,395	\$35,509	\$376,295
Berlin	\$37,514	\$21,554	\$44,121	\$435	\$14,323	\$117,947
Bethesda	\$150,193	\$81,056	\$176,643	\$1,552	\$41,481	\$450,925
Bromo	\$107,105	\$48,566	\$125,967	\$1,036	\$30,215	\$312,890
Cambridge	\$10,038	\$3,097	\$11,806	\$62	\$2,320	\$27,324
Catonsville	\$31,797	\$5,848	\$37,396	\$138	\$5,707	\$80,885
Chestertown	\$32,442	\$31,198	\$38,156	\$724	\$17,009	\$119,529
Crisfield	\$1,835	\$3,403	\$2,158	\$53	\$1,897	\$9,345
Cumberland	\$40,177	\$44,759	\$47,252	\$948	\$17,027	\$150,163
Denton	\$0	\$0	\$0	\$0	\$0	\$0
Easton	\$40,883	\$5,919	\$48,083	\$108	\$8,838	\$103,830
Elkton	\$22,175	\$11,061	\$26,080	\$218	\$6,517	\$66,051
Frederick	\$363,564	\$190,502	\$427,590	\$4,291	\$108,171	\$1,094,118
Frostburg	\$27,419	\$18,925	\$32,247	\$430	\$8,507	\$87,528
Gateway	\$0	\$0	\$0	\$0	\$0	\$0
Grantsville	\$0	\$0	\$0	\$0	\$0	\$0
Hagerstown	\$160,518	\$96,250	\$188,786	\$2,140	\$49,519	\$497,213
Havre de Grace	\$57,724	\$4,463	\$67,889	\$46	\$12,723	\$142,845
Highlandtown	\$48,402	\$22,346	\$56,926	\$355	\$17,427	\$145,456
Leonardtwn	-\$52,550	-\$6,134	-\$61,804	-\$194	-\$7,630	-\$128,313
Oakland	\$3,018	-\$496	\$3,549	-\$14	\$849	\$6,907
Pennsylvania Ave.	\$0	\$0	\$0	\$0	\$0	\$0
Salisbury	\$114,236	\$154,116	\$134,353	\$2,891	\$61,039	\$466,635
Silver Spring	\$148,170	\$86,757	\$174,263	\$1,849	\$48,964	\$460,004
Snow Hill	-\$2,470	-\$3,095	-\$2,905	-\$108	-\$1,578	-\$10,157
Station North	\$53,391	\$24,352	\$62,794	\$563	\$18,814	\$159,914
Stevensville	\$50,887	\$41,487	\$59,848	\$910	\$17,620	\$170,753
Wheaton	\$104,757	\$107,641	\$123,205	\$2,413	\$41,869	\$379,885
Total	\$1,675,320	\$1,062,922	\$1,970,352	\$22,243	\$557,133	\$5,287,972

Sources: IMPLAN, MSAC, RESI

FY 2022 Maryland Arts and Entertainment District Economic and Tax Impact Analysis
RESI of Towson University

Figure 31: Total State Tax Footprint of Maryland's A&E Districts, FY 2022

District	Property	Income	Sales	Payroll	Other	Total
Annapolis	N/R	N/R	N/R	N/R	N/R	N/R
Bel Air	\$241,397	\$150,365	\$283,908	\$3,154	\$73,863	\$752,688
Berlin	\$83,864	\$53,567	\$98,633	\$1,130	\$29,478	\$266,673
Bethesda	\$165,913	\$91,914	\$195,132	\$1,788	\$46,621	\$501,368
Bromo	\$109,230	\$50,033	\$128,466	\$1,068	\$30,910	\$319,706
Cambridge	\$17,377	\$8,166	\$20,437	\$172	\$4,720	\$50,872
Catonsville	\$97,856	\$51,474	\$115,089	\$1,129	\$27,306	\$292,854
Chestertown	\$71,039	\$57,856	\$83,549	\$1,303	\$29,629	\$243,376
Crisfield	\$5,460	\$5,907	\$6,421	\$108	\$3,082	\$20,977
Cumberland	\$53,120	\$53,699	\$62,475	\$1,143	\$21,259	\$191,695
Denton	\$5,964	\$4,119	\$7,014	\$89	\$1,950	\$19,136
Easton	\$40,883	\$5,919	\$48,083	\$108	\$8,838	\$103,830
Elkton	\$36,022	\$20,625	\$42,366	\$426	\$11,044	\$110,483
Frederick	\$537,948	\$310,945	\$632,684	\$6,907	\$165,190	\$1,653,674
Frostburg	\$45,781	\$31,608	\$53,843	\$706	\$14,511	\$146,448
Gateway	\$0	\$0	\$0	\$0	\$0	\$0
Grantsville	\$6,470	\$4,468	\$7,609	\$97	\$2,115	\$20,760
Hagerstown	\$176,011	\$106,951	\$207,008	\$2,372	\$54,585	\$546,928
Havre de Grace	\$93,954	\$29,487	\$110,500	\$589	\$24,569	\$259,099
Highlandtown	\$86,634	\$48,752	\$101,891	\$929	\$29,927	\$268,133
Leonardtwn	-\$15,134	\$19,708	-\$17,799	\$367	\$4,604	-\$8,254
Oakland	\$20,940	\$11,882	\$24,628	\$255	\$6,709	\$64,414
Pennsylvania Ave.	\$0	\$0	\$0	\$0	\$0	\$0
Salisbury	\$201,273	\$214,231	\$236,719	\$4,196	\$89,498	\$745,917
Silver Spring	\$148,170	\$86,757	\$174,263	\$1,849	\$48,964	\$460,004
Snow Hill	\$8,596	\$4,548	\$10,110	\$58	\$2,040	\$25,352
Station North	\$93,322	\$51,931	\$109,756	\$1,162	\$31,870	\$288,042
Stevensville	\$57,704	\$46,196	\$67,866	\$1,012	\$19,849	\$192,628
Wheaton	\$154,714	\$142,146	\$181,960	\$3,162	\$58,203	\$540,186
Total	\$2,544,509	\$1,663,254	\$2,992,609	\$35,280	\$841,335	\$8,076,987

Sources: Americans for the Arts, IMPLAN, MSAC, RESI

Appendix D—District Websites

Figure 32: A&E District Websites

District	County	Website
Annapolis	Anne Arundel	www.annapolisartsdistrict.org
Bel Air	Harford	www.belairartsandentertainment.org
Berlin	Worcester	www.berlinmainstreet.com
Bethesda	Montgomery	www.bethesda.org
Bromo Tower	Baltimore City	www.bromoartsdistrict.org
Cambridge	Dorchester	www.choosecambridge.com
Catonsville	Baltimore City	www.catonsvilleartsdistrict.org
Chestertown	Kent	www.TownofChestertown.com
Crisfield	Somerset	www.crisfieldarts.org
Cumberland	Allegany	www.alleganyartscouncil.org
Denton	Caroline	www.carolinearts.org
Easton	Talbot	www.discovereaston.com
Elkton	Cecil	www.elktonarts.com
Frederick	Frederick	www.frederickartscouncil.org
Frostburg	Allegany	www.downtownfrostburg.com
Gateway	Prince George's	www.mygatewayarts.com
Grantsville	Garrett	www.garrettarts.org
Hagerstown	Washington	www.hagerstownmd.org
Havre de Grace	Harford	www.hdgartscollective.org
Highlandtown	Baltimore City	www.southeastcdc.org
Leonardtwn	St. Mary's	www.leonardtwnmd.gov
Oakland	Garrett	www.garrettarts.org
Pennsylvania Ave.	Baltimore City	www.blackartsdistrict.org
Salisbury	Wicomico	www.salisburyartsdistrict.com
Silver Spring	Montgomery	www.silverspringdowntown.com
Snow Hill	Worcester	www.snowhillmd.gov
Station North	Baltimore City	www.centralbaltimore.org
Stevensville	Queen Anne's	www.stevensvilleartsandentertainment.org
Wheaton	Montgomery	www.wheatonmd.org

Sources: MSAC, RESI

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